

02-01-2014 Launch for Maria Suarez



Southern Wine & Spirit
 Dedicated to Sales & Service

User Information

Last Name: Suarez
 First Name: Maria
 Division Title: Inventory Control Manager
 Department: NY Met Whse - Day
 Division Code: 4500
 Location: NY Metro - Syosset - 345
 Manager: John Wilkinson

Overview

The Performance Appraisal provides feedback and documents a manager's conclusions about an employee's performance contribution. The appraisal is about a job and how well it is performed.

In this process the employee will be evaluated against both what they have accomplished (Job Accountabilities) and how they accomplished them (Performance Factors). Both of these factors are equally important to overall job performance and thus they are equally weighted in this process.

Primary reasons for performance appraisals include:

- Clarifying job duties, performance expectations, and goals.
- Evaluating past performance.
- Development planning to improve future performance.

The following rating scale will be used throughout this process:

Performance Rating Scale

Non-Performer	Needs Improvement	Performer	High Performer	Top Performer
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Top Performer

- **Far exceeds** key performance expectations; accomplishments are unique and sustained over the entire performance period
- Performance is exceptional and less supervision than normal is required
- A role model for others; it is difficult to indicate how performance could be improved

High Performer

- **Often exceeds** and consistently meets all key performance expectations
- Accomplishments and contributions are higher than required by the job

Performer

- All key job **expectations are met and sometimes exceeded** with normal direction and assistance
- A solid performer who displays all the behaviors required for successful job performance

Needs Improvement

- **Performance partially satisfies the key requirements of the job**
- **Timely improvement is required** to consistently meet job expectations. This is a transition level requiring improvement to acceptable performance. The individual may be learning the role and not yet proficient

Non-Performer

- Performance does not meet key job requirements
- **Immediate and substantial improvement is required** or termination is indicated

Manager Instructions - Job Accountabilities

Please provide an individual rating on each of the key job accountabilities below. Use the scale provided above for your rating. For each job accountability you should provide specific examples of what the employee did/accomplished to achieve the selected rating. Each job accountability will be weighted to produce an overall Job Accountabilities Score.

Job Accountabilities**Accuracy_FS**

- Work products are correct the first time

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria is very accurate with her work. If she does have an error in her work she corrects it quickly.

Productivity_FS

- Amount of work accomplished
- Progress on project deliverables

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria's team conducts cycle counts regularly and handles large amounts of requests for vintage checks, etc on a daily basis. They are timely and efficient. They also typically have the physical inventory reconciled within a week after our counts are completed.

Projects Completed within Project Objectives

- On time
- On Budget
- Project execution is up to expectations

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Physical inventories, cycle counts, vintage checks, and other product issues are timely and completed accurately

Quality_FS

- Completed to professional standards
- Work products are user friendly

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria and her staff complete their work professionally and supply feed back to sales, marketing and the warehouse in a timely fashion. An area of improvement would be to figure out a way to prioritize the requests that the department receives. Some requests are of a higher priority and being able to prioritize would make the department even more effective

Other Accomplishments

Please enter any other accomplishments you want your manager to be aware of before he/she completes your performance evaluation. This might be from special projects or other things you did outside of the scope of your normal work.

Attendance

Attendance is an important part of job expectations. Any rating below consistently meets expectations will require additional explanation

and discussion. Continued attendance issues may result in discipline or jeopardize employment. Note: This rating does not get directly calculated into the employee's overall job accountabilities score.

Attendance

Rating: Some Attendance Issues

Comments by John Wilkinson:

Maria has had some issues this past year with calling out and arriving late to work. She has stated that she has had some health issues and needs to go to HR for FMLA paperwork. I have requested that she take care of this but have not received any feedback from HR that she has been approved for FMLA. I expect that this will be handled in the first qtr of 2014

Manager Instructions - Performance Factors

Use this section to describe and rate the employee's performance against the critical Performance Factors for this role. Before you rate the Performance Factor you should click on the writing assistant for each Performance Factor to understand the guidelines for rating each Performance Factor. We have provided behavioral statements that define the bottom (Non-Performer), middle (Performer) & top (Top Performer) ends of the 5-point rating scale. It is possible that the overall evaluation of a given Performance Factor will fall between these three points on the scale (i.e., performance is best described as High Performer or Needs Improvement). You should use the most appropriate description along this 5-point rating scale. All of the Performance Factors are equally important to an employee's success and thus they will be averaged to arrive at the overall Performance Factor Score.

Performance Factors

Communication Skills

Communicates in a clear and timely manner; is honest and thorough in all communications; uses effective listening skills; provides presentations that are clear, logical and contain relevant information; and completes paperwork accurately and thoroughly.

Rating: Needs Improvement

Weight: 10.0%

Comments by John Wilkinson:

Maria communicates in a timely manner; keeps others informed. Where Maria struggles is when she gets defensive and accusatory. While she is passionate in her beliefs she is not open minded to others opinions. Examples of this have been inventory meetings with the warehouse and accounting.

Paperwork/reports are accurate and thorough a majority of the time.

Continuous Improvement

Regularly seeks out ways to accomplish work more efficiently; questions assumptions and offers suggestions for change; and openly considers input from others on how to improve processes.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria consistently tries to approve her department. She uses technology to make her department more efficient and tries to consistently improve their output. She is open to suggestions that will improve the information that her department can supply and has a can do attitude

Customer Focus

(Customers may be internal or external.) Educates the customer about processes; modifies own style to match customer's; makes customers/suppliers needs their own priority; is willing to go above and beyond to meet customer needs; effectively diffuses customer problems; keeps customers informed; and is patient, calm, and polite with all customers.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria knows and understands that her department provides key information for sales, marketing, suppliers, and the warehouse. She takes this very seriously and expects that her department will provide useful accurate information

Job Knowledge

is easily able to navigate company systems to access and enter information; has the basic knowledge needed to perform current role; stays up-to-date on new products and programs available and new work processes; actively works to expand knowledge base; understands how own role contributes to company performance; has a broad understanding of the industry and how it operates; understands basics of Federal and State ABC laws and regulations; can perform basic math skills needed for role; and consistently acts in a safe manner in the workplace.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is recognized by others to be a subject matter expert and consistently tries to improve her department with new ideas. She regularly asks questions and seeks out learning opportunities to expand understanding of the function and business. Maria has a broad sense of how functions impact other functions within the company is cross-trained in other areas. She has a thorough understanding of the basic math required to perform the job and the ability to do complex calculations. She is very skilled in Excel and uses it to her advantage. Maria understands competitive sales trends and customer demographics and how it relates to the accuracy of the inventory.

Planning & Organizing

Prepares in advance and sets objectives; prioritizes work; is able to multi-task, uses time wisely; organizes work to improve efficiencies; provides flexibility in schedule for changes; develops processes for follow-up; and tracks product turnover to understand re-order needs.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is consistent with her planning of inventories and work flow. Maria takes a big picture view of what needs to be accomplished before planning how work will get done. She manages projects with limited resources when necessary. She develops and utilizes an effective pre-plan for each day and prioritizes work to be accomplished.

Problem Solving

Systematically collects information; integrates information from multiple sources; gets to the root cause of problems; is able to uncover trends, patterns or discrepancies; solves problems in a timely manner; considers consequences of decisions; considers alternative solutions to meet customer needs; does not bring problems to others, brings issues and potential solutions; and proactively reviews accounts so issues can be addressed quickly and problems avoided.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria systematically gathers information and considers multiple alternatives before arriving at a final solution. She helps the warehouse and accounting get to the root cause of problems with inventory. She solves complex problems in a timely manner by thoroughly investigating discrepancies in inventory. Maria is able to uncover trends, patterns or discrepancies, including those which are not always evident. This is evident at many inventory meetings when she explains how she uncovered discrepancies.

Relationship Building

Finds reasons to be in front of the customer/supplier; gets to know others; is friendly and develops good rapport; is reliable, delivers on commitments; creates win-win solutions; is respectful of others' time, is patient; develops broad internal and external relationships; adapts own style to mirror customers/suppliers; makes oneself a valued asset to customers; and projects a professional image.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is reliable - shows up consistently; delivers on commitments. She develops a broad set of internal and external relationships to get work done. Maria projects a professional image at all times.

Results Oriented

Takes personal accountability for results; sets specific and difficult goals; monitors progress toward goals; sees action items through to completion; seldom lets obstacles get in the way; promptly responds to requests/issues; and is willing to ask others for help to achieve goals.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria takes personal accountability for own activities and results and seeks to assist with team results, this is clearly evident during each physical inventory when issues arise. She continuously raises the bar on her own performance. She always looks for ways to do the job at hand in a smarter way. She constantly monitors progress against goals; has a sense of urgency. This is evident during every physical inventory. She does not let obstacles get in the way of goal achievement.

Teamwork

Is willing to assist and work cooperatively with co-workers; displays trust, respect, and appreciation for the individual talents, differences, and abilities of others regardless of cultural or demographic differences; considers impact of own work on others; collaborates with others; considers team needs before own; and shows respect for others

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria works well with other departments. In the past she did struggle occasionally but has improved her approach over the past few years

Work Ethic

Takes personal accountability for getting work done; takes pride in the quality of own work; does what is right, not what is easy; takes initiative; pays attention to details; meets reasonable deadlines and keeps up with a fast-paced work environment; displays a positive, 'can do' attitude; and has a sense of urgency.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria takes action to make improvements without being asked. She takes initiative and constantly looks for work to do that will improve her departments results. Maria takes care with work and pays attention to details. She displays a positive, 'can do' attitude and has a sense of urgency.

Performance Summary

This section summarizes the results from Job Accountabilities and Performance Factors sections of the performance evaluation form. The Overall Rating is computed by adding the average score on the Performance Factors with the weighted average score from the Job Accountabilities. The Overall Rating is based on the following rating scale:

Top Performer	4.36	5.00
High Performer	3.51	4.35
Performer	2.85	3.50
Needs Improvement	2.00	2.84
Non-Performer	1.00	1.99

Overall Rating 3.45 / 5.0

	Rating	Weights
Job Accountabilities	3.5 / 5.0	50.0%
Accuracy_FS	High Performer	25.0%
Productivity_FS	Performer	25.0%
Projects Completed within Project Objectives	High Performer	25.0%
Quality_FS	Performer	25.0%
Performance Factors	3.4 / 5.0	50.0%
Communication Skills	Needs Improvement	10.0%
Continuous Improvement	High Performer	10.0%

Customer Focus	Performer	10.0%
Job Knowledge	High Performer	10.0%
Planning & Organizing	Performer	10.0%
Problem Solving	High Performer	10.0%
Relationship Building	Performer	10.0%
Results Oriented	High Performer	10.0%
Teamwork	Performer	10.0%
Work Ethic	High Performer	10.0%

Development Plan Instructions - Manager

The purpose of this section is to identify up to three areas in which the employee should focus on for development. The employee may have drafted his/her ideas during the employee input phase. You should consider the employee's input, but you may add, delete, or modify his/her development ideas. Together you will finalize the development plan.

To build the employee's development plan (or to add a new item) complete the following actions:

- One at a time, enter the areas you think the employee should focus on for development. To do this you will click on the button Add New Development Objective.
- For each performance factor or job accountability, write a specific action plan for how the employee should improve their performance.
- Indicate a target date for completion of each action plan.
- Click on the save button to Save and Close that development item.
- Follow the same process to enter the next development area.

Here is an example of what your completed development plan may look like:

Performance Factor/Job Accountability: Relationship Building

Action Plan: Action Plan: Talk to one person outside of your function each month with a list of predetermined questions to learn more about their function and how it relates to what you do.

Target Date For Completion: 06/30/20xx

Performance Factor/Job Accountability: Teamwork

Action Plan: For the next two months when someone provides you with input or feedback practice not getting defensive. Look for points of agreement and common interest, especially if you disagree with what someone is saying. Show appreciation for their input. At the end of the two month period, ask your peers for feedback to see if you have improved.

Target Date for Completion: 03/01/20xx

Development Plan

Job Accountability / Performance Factor: Communication Skills

Action Plan: Over the course of the next year, you need to work on taking courses in HR on how to improve as a supervisor/manager. HR has a whole new library of training guides.

Target Date for Completion: 12/31/2014

Final Comments

Employee Comments: Please write any comments or information you wish to have documented as part of this review.

Employee Signature

Please print name and sign below.

Maria Suarez

Employee (Print Name)

Maria Suarez 5/20/2014

Employee Signature

Date

John Wilkinson

Manager (Print Name)

John Wilkinson

Manager Signature

Date



02-01-2013 Launch for Maria Suarez

User Information

Last Name: Suarez
 Preferred First Name: Maria
 Division Title: Inventory Control Manager
 Department: NY Met Whse - Day
 Division: 4500
 Location: NY Metro - Syosset

Overview

Manager Instructions - Job Accountabilities

Job Accountabilities

Accuracy_FS

- Work products are correct the first time

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria's analysis and reconciliations of the physical inventories are typically accurate.

Productivity_FS

- Amount of work accomplished
- Progress on project deliverables

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria has a good grasp of how long it takes to reconcile inventories and how long it takes to perform cycle counts. I would like to see her build some tracking models of what her staff covers daily.

Projects Completed within Project Objectives

- On time
- On Budget
- Project execution is up to expectations

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Monthly inventories and cycle counts are completed in a timely fashion.

Quality_FS

- Completed to professional standards
- Work products are user friendly

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria has a very good knowledge of Excel and Sapphire which allows her complete her work to a high standard. She has also been able to aid the unsalable department with her skills in Excel.

Other Accomplishments**Attendance****Attendance**

Rating: Consistently Meets Expectations

Manager Instructions - Performance Factors**Performance Factors****Communication Skills**

Communicates in a clear and timely manner; is honest and thorough in all communications; uses effective listening skills; provides presentations that are clear, logical and contain relevant information; and completes paperwork accurately and thoroughly.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria communicates timely and effectively. occasionally she is misunderstood or misinterprets what another co-work has stated. Her communication skills have improved each year over the last 3-5 years.

Continuous Improvement

Regularly seeks out ways to accomplish work more efficiently; questions assumptions and offers suggestions for change; and openly considers input from others on how to improve processes.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

This area is one of Maria's strong points. She is always looking for better ways to improve upon what she does. RF inventory has been increased to cover the entire physical. She has worked closely with IT in order to enhance and improve the RF program as well as the unsalable process.

Customer Focus

(Customers may be internal or external.) Educates the customer about processes; modifies own style to match customer's; makes customers/suppliers needs their own priority; is willing to go above and beyond to meet customer needs; effectively diffuses customer problems; keeps customers informed; and is patient, calm, and polite with all customers.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria goes above and beyond to meet customer needs on a regular basis. She assists marketing and the warehouse unsalable dept by regularly going above and beyond.

Job Knowledge

Is easily able to navigate company systems to access and enter information; has the basic knowledge needed to perform current role; stays up-to-date on new products and programs available and new work processes; actively works to expand knowledge base; understands how own role contributes to company performance; has a broad understanding of the industry and how it operates; understands basics of Federal and State ABC laws and regulations; can perform basic math skills needed for role; and consistently acts in a safe manner in the workplace.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria knows her job and regularly meets or exceeds expectations. She has a good working knowledge of Sapphire and Excel. I would like to see her more involved in day to day movement of product in the warehouse. A more thorough understanding of how and why warehousemen do what they do would help her department and the warehouse enormously.

Planning & Organizing

Prepares in advance and sets objectives; prioritizes work; is able to multi-task, uses time wisely; organizes work to improve efficiencies; provides flexibility in schedule for changes; develops processes for follow-up; and tracks product turnover to understand re-order needs.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Monthly meetings for the planning of Physical inventories and follow up meetings to discuss the positive and negatives of each physical aid in the planning and organizing of each physical.

Problem Solving

Systematically collects information; integrates information from multiple sources; gets to the root cause of problems; is able to uncover trends, patterns or discrepancies; solves problems in a timely manner; considers consequences of decisions; considers alternative solutions to meet customer needs; does not bring problems to others, brings issues and potential solutions; and proactively reviews accounts so issues can be addressed quickly and problems avoided.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is a good problem solver. She aids her staff as well as the warehouse in solving inventory issues. There have been times when Maria does not approach a problem with an open mind. An example of this is having preconceived notions as to why a warehouseman did what he did. Research has born out that the issues were caused by a lack of knowledge not a lack of care.

Relationship Building

Finds reasons to be in front of the customer/supplier; gets to know others; is friendly and develops good rapport; is reliable, delivers on commitments; creates win-win solutions; is respectful of others' time, is patient; develops broad internal and external relationships; adapts own style to mirror customers/suppliers; makes oneself a valued asset to customers; and projects a professional image.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria has made improvements in this area. She has improved her relationship with the accounting department. I would like to see her continue to improve in this area it will benefit her and her team

Results Oriented

Takes personal accountability for results; sets specific and difficult goals; monitors progress toward goals; sees action items through to completion; seldom lets obstacles get in the way; promptly responds to requests/issues; and is willing to ask others for help to achieve goals.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is very results oriented. She strives hard for perfection and is very disappointed with errors. She does work around most obstacles. Seeking assistance from others more often would help her in this area.

Teamwork

Is willing to assist and work cooperatively with co-workers; displays trust, respect, and appreciation for the individual talents, differences, and abilities of others regardless of cultural or demographic differences; considers impact of own work on others; collaborates with others; considers team needs before own; and shows respect for others

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria works well with her co-workers.

Work Ethic

Takes personal accountability for getting work done; takes pride in the quality of own work; does what is right, not what is easy; takes initiative; pays attention to details; meets reasonable deadlines and keeps up with a fast-paced work environment; displays a positive, 'can do' attitude; and has a sense of urgency.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria takes pride in the quality of her work and does what is right not what is easy.

Performance Summary

Overall Rating 3.28 / 5.0

	Rating	Weights
Job Accountabilities	3.25 / 5.0	50.0%
Accuracy_FS	Performer	25.0%
Productivity_FS	Performer	25.0%
Projects Completed within Project Objectives	Performer	25.0%
Quality_FS	High Performer	25.0%
Performance Factors	3.3 / 5.0	50.0%
Communication Skills	Performer	10.0%
Continuous Improvement	High Performer	10.0%
Customer Focus	High Performer	10.0%
Job Knowledge	Performer	10.0%
Planning & Organizing	Performer	10.0%
Problem Solving	Performer	10.0%
Relationship Building	Performer	10.0%
Results Oriented	High Performer	10.0%
Teamwork	Performer	10.0%
Work Ethic	Performer	10.0%

Development Plan Instructions - Manager**Development Plan**

Job Accountability / Performance Factor: Teamwork

Action Plan: Work with Barry Finkelstein and Chris Sheridan to educate them on all the ins and outs of the RF program that is used for unsalables. Have a memeber of your team work with them to improve the destruction process

Monthly progress reports to be reviewed with me starting 4/30/2013 and ending when best practices are achieved

Target Date for Completion: 12/31/2013

Job Accountability / Performance Factor: Productivity

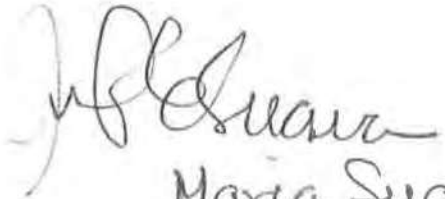
Action Plan: Produce a daily productivity report for your department. For example how many cycle counts were performed daily. How many vintage checks, how many location checks, etc

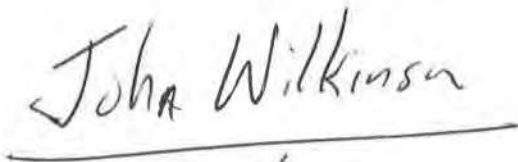
I am willing to review and help assist in the set-up. I would like to see a rough draft by the end of April with a completed fully functioning and tested report by 6/30/2013

Target Date for Completion: 06/30/2013

Final Comments

Employee Signature


Maria Suarez


John Wilkins





03-01-2012 Launch for Maria Suarez

User Information

Last Name: Suarez
 Preferred First Name: Maria
 Division Title: Supv Inventory Control
 Department: NY Met Whse - Day
 Division: 4500
 Location: NY Metro - Syosset

Overview

Manager Instructions - Job Accountabilities

Job Accountabilities

Accuracy_FS

- Work products are correct the first time

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Procedures put in place to cycle count and locate product daily are very effective

Productivity_FS

- Amount of work accomplished
- Progress on project deliverables

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Department is timely on all requests for vintage checks and cycle counts. Physical inventories are reconciled timely

Projects Completed within Project Objectives

- On time
- On Budget
- Project execution is up to expectations

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Physical inventories in 2011 went well and RF counts were implements

Quality_FS

- Completed to professional standards

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- Work products are user friendly

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria has very good reporting skills. Numbers and counts are accurate

Other Accomplishments

Attendance

Attendance

Rating: Consistently Meets Expectations

Manager Instructions - Performance Factors

Performance Factors

Communication Skills

Communicates in a clear and timely manner; is honest and thorough in all communications; uses effective listening skills; provides presentations that are clear, logical and contain relevant information; and completes paperwork accurately and thoroughly.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria's communication skills meet expectations

Continuous Improvement

Regularly seeks out ways to accomplish work more efficiently; questions assumptions and offers suggestions for change; and openly considers input from others on how to improve processes.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria tries to improve and make her department better. She consistently comes up with new ideas to improve counts and the warehouse

Customer Focus

(Customers may be internal or external.) Educates the customer about processes; modifies own style to match customer's; makes customers/suppliers needs their own priority; is willing to go above and beyond to meet customer needs; effectively diffuses customer problems; keeps customers informed; and is patient, calm, and polite with all customers.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria and her team are timely and efficient and that allows the company time to communicate back with customers

Job Knowledge

Is easily able to navigate company systems to access and enter information; has the basic knowledge needed to perform current role; stays up-to-date on new products and programs available and new work processes; actively

works to expand knowledge base; understands how own role contributes to company performance; has a broad understanding of the industry and how it operates; understands basics of Federal and State ABC laws and regulations; can perform basic math skills needed for role; and consistently acts in a safe manner in the workplace.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria's job knowledge is very high. One thing she needs to work on is knowing what she doesn't know. It's OK to not know everything. Maria at times insists that she knows something and is very convincing but it turns out that she is mistaken. Example of that was the RF gun program for keying in unsalables.

Planning & Organizing

Prepares in advance and sets objectives; prioritizes work; is able to multi-task, uses time wisely; organizes work to improve efficiencies; provides flexibility in schedule for changes; develops processes for follow-up; and tracks product turnover to understand re-order needs.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria's inventories in 2011 were the best we had in 6 years.

Problem Solving

Systematically collects information; integrates information from multiple sources; gets to the root cause of problems; is able to uncover trends, patterns or discrepancies; solves problems in a timely manner; considers consequences of decisions; considers alternative solutions to meet customer needs; does not bring problems to others, brings issues and potential solutions; and proactively reviews accounts so issues can be addressed quickly and problems avoided.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is very knowledgeable and is able to think outside the box to solve problems.

Relationship Building

Finds reasons to be in front of the customer/supplier; gets to know others; is friendly and develops good rapport; is reliable, delivers on commitments; creates win-win solutions; is respectful of others' time, is patient; develops broad internal and external relationships; adapts own style to mirror customers/suppliers; makes oneself a valued asset to customers; and projects a professional image.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria improved in 2011 towards building relationships with her staff and other departments.

Results Oriented

Takes personal accountability for results; sets specific and difficult goals; monitors progress toward goals; sees action items through to completion; seldom lets obstacles get in the way; promptly responds to requests/issues; and is willing to ask others for help to achieve goals.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

There are times during physical inventory reconciliation that Maria does not take personal accountability for the count process. Not only does she need to set up the physical inventory but she also needs to supervise it and take the good credit and the bad blame. With that being said she is driven by results and always expects the best.

Teamwork

Is willing to assist and work cooperatively with co-workers; displays trust, respect, and appreciation for the individual talents, differences, and abilities of others regardless of cultural or demographic differences; considers impact of own work on others; collaborates with others; considers team needs before own; and shows respect for others

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria works well in a team setting

Work Ethic

Takes personal accountability for getting work done; takes pride in the quality of own work; does what is right, not what is easy; takes initiative; pays attention to details; meets reasonable deadlines and keeps up with a fast-paced work environment; displays a positive, 'can do' attitude; and has a sense of urgency.

Rating: High Performer

Weight: 10.0%

Performance Summary

Overall Rating 3.85 / 5.0

	Rating	Weights
Job Accountabilities	4.0 / 5.0	50.0%
Accuracy_FS	High Performer	25.0%
Productivity_FS	High Performer	25.0%
Projects Completed within Project Objectives	High Performer	25.0%
Quality_FS	High Performer	25.0%
Performance Factors	3.7 / 5.0	50.0%
Communication Skills	Performer	10.0%
Continuous Improvement	High Performer	10.0%
Customer Focus	High Performer	10.0%
Job Knowledge	High Performer	10.0%
Planning & Organizing	High Performer	10.0%
Problem Solving	High Performer	10.0%
Relationship Building	Performer	10.0%
Results Oriented	Performer	10.0%
Teamwork	High Performer	10.0%
Work Ethic	High Performer	10.0%

Development Plan Instructions - Manager**Development Plan****Final Comments**

Employee Signature

MARIA Suarez
5/02/2012

Manager Name John Wilkinson

Manager Signature [Signature]

CONFIDENTIAL

SGWS 001468

04-01-2011 Launch for Maria Suarez**User Information**

Last Name: Suarez
 First Name: Maria
 Title: Supervisor Inventory Con
 Department: NY Met Whse - Day
 Division: 4500
 Location: NY Metro - Syosset

Overview

The Performance Appraisal provides feedback and documents a manager's conclusions about an employee's performance contribution. The appraisal is about a job and how well it is performed.

In this process the employee will be evaluated against both what they have accomplished (Job Accountabilities) and how they accomplished them (Performance Factors). Both of these factors are equally important to overall job performance and thus they are equally weighted in this process.

Primary reasons for performance appraisals include:

- Clarifying job duties, performance expectations, and goals.
- Evaluating past performance.
- Development planning to improve future performance.

The following rating scale will be used throughout this process:

Performance Rating Scale

Non-Performer	Needs Improvement	Performer	High Performer	Top Performer
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Top Performer

- **Far exceeds** key performance expectations; accomplishments are unique and sustained over the entire performance period
- Performance is exceptional and less supervision than normal is required
- A role model for others; it is difficult to indicate how performance could be improved

High Performer

- **Often exceeds** and consistently meets all key performance expectations
- Accomplishments and contributions are higher than required by the job

Performer

- All key job **expectations are met and sometimes exceeded** with normal direction and assistance
- A solid performer who displays all the behaviors required for successful job performance

Needs Improvement

- **Performance partially satisfies the key requirements of the job**
- **Timely improvement is required** to consistently meet job expectations. This is a transition level requiring improvement to acceptable performance. The individual may be learning the role and not yet proficient

Non-Performer

- Performance does not meet key job requirements
- **Immediate and substantial improvement is required** or termination is indicated

Manager Instructions - Job Accountabilities

Please provide an individual rating on each of the key job accountabilities below. Use the scale provided above for your rating. For each job accountability you should provide specific examples of what the employee did/accomplished to achieve the selected rating. Each job accountability will be weighted to produce an overall Job Accountabilities Score.

Job Accountabilities**Accuracy_FS**

- Work products are correct the first time

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria is usually very accurate in her paperwork and research. She sometimes relies too much on what she sees in Sapphire and does not question it. When a sku is flagged as a problem, Maria needs to "ask herself why are they asking?" This will enable her dig deeper the first time around.

Productivity_FS

- Amount of work accomplished
- Progress on project deliverables

Rating: High Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria and her staff work very quickly and efficiently and hit almost all deadlines. Examples of this are vintage checks, cycle counts, and product inspections. It is very rare for her and her staff not to have an answer in a very reasonable amount of time.

Projects Completed within Project Objectives

- On time
- On Budget
- Project execution is up to expectations

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria and her staff handle projects and monthly physicals timely and they meet all expectation and occasionally exceed expectation

Quality_FS

- Completed to professional standards
- Work products are user friendly

Rating: Performer

Weight: 25.0%

Comments by John Wilkinson:

Maria and he staff's quality of work meets or exceeds expectations on a regular basis

Other Accomplishments

Please enter any other accomplishments you want your manager to be aware of before he/she completes your performance evaluation. This might be from special projects or other things you did outside of the scope of your normal work.

Attendance

Attendance is an important part of job expectations. Any rating below consistently meets expectations will require additional explanation and discussion. Continued attendance issues may result in discipline or jeopardize employment. Note: This rating does not get directly calculated into the employee's overall job accountabilities score.

Attendance**Rating:** Consistently Meets Expectations**Manager Instructions - Performance Factors**

Use this section to describe and rate the employee's performance against the critical Performance Factors for this role. Before you rate the Performance Factor you should click on the writing assistant for each Performance Factor to understand the guidelines for rating each Performance Factor. We have provided behavioral statements that define the bottom (Non-Performer), middle (Performer) & top (Top Performer) ends of the 5-point rating scale. It is possible that the overall evaluation of a given Performance Factor will fall between these three points on the scale (i.e., performance is best described as High Performer or Needs Improvement). You should use the most appropriate description along this 5-point rating scale. All of the Performance Factors are equally important to an employee's success and thus they will be averaged to arrive at the overall Performance Factor Score.

Performance Factors**Communication Skills**

Communicates in a clear and timely manner; is honest and thorough in all communications; uses effective listening skills; provides presentations that are clear, logical and contain relevant information; and completes paperwork accurately and thoroughly.

Rating: Needs Improvement**Weight:** 10.0%**Comments by John Wilkinson:**

Maria is honest and communicates very timely. Maria occasionally and unfortunately misinterprets emails between herself and other departments which occasionally lead to email wars. While most of it is trivial and 90% of the time a misunderstanding, she needs to work on this form of communication.

Continuous Improvement

Regularly seeks out ways to accomplish work more efficiently; questions assumptions and offers suggestions for change; and openly considers input from others on how to improve processes.

Rating: High Performer**Weight:** 10.0%**Comments by John Wilkinson:**

Maria regularly looks to improve her department. RF inventory is one of those improvements. We have monthly meetings for physical inventory prep where most of the time Maria leads the charge with new ideas and ways to improve.

Customer Focus

(Customers may be internal or external.) Educates the customer about processes; modifies own style to match customer's; makes customers/suppliers needs their own priority; is willing to go above and beyond to meet customer needs; effectively diffuses customer problems; keeps customers informed; and is patient, calm, and polite with all customers.

Rating: Performer**Weight:** 10.0%**Comments by John Wilkinson:**

Maria does not work directly with any customers but her desire to make the inventory perfect affects our customers in a positive way.

Job Knowledge

is easily able to navigate company systems to access and enter information; has the basic knowledge needed to perform current role; stays up-to-date on new products and programs available and new work processes; actively works to expand knowledge base; understands how own role contributes to company performance; has a broad understanding of the industry and how it operates; understands basics of Federal and State ABC laws and regulations; can perform basic math skills needed for role; and consistently acts in a safe manner in the workplace.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria's job knowledge is extremely high. She understands what she needs to know about Sapphire and taking physicals. One thing Maria needs to learn is to understand what she does not know. an example of this was when RF inventory was being implemented

Planning & Organizing

Prepares in advance and sets objectives; prioritizes work; is able to multi-task, uses time wisely; organizes work to improve efficiencies; provides flexibility in schedule for changes; develops processes for follow-up; and tracks product turnover to understand re-order needs.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

All inventories are organized well and continue to improve. Communication of issues, unfortunately tends to be last minute surprises.

Problem Solving

Systematically collects information; integrates information from multiple sources; gets to the root cause of problems; is able to uncover trends, patterns or discrepancies; solves problems in a timely manner; considers consequences of decisions; considers alternative solutions to meet customer needs; does not bring problems to others, brings issues and potential solutions; and proactively reviews accounts so issues can be addressed quickly and problems avoided.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria solves problems most of the time on her own. She is capable of discovering the root causes and she uncovers trends and patterns. She does have room for improvement. Knowing what she doesn't know and asking for help earlier would make her more successful

Relationship Building

Finds reasons to be in front of the customer/supplier; gets to know others; is friendly and develops good rapport; is reliable, delivers on commitments; creates win-win solutions; is respectful of others' time, is patient; develops broad internal and external relationships; adapts own style to mirror customers/suppliers; makes oneself a valued asset to customers; and projects a professional image.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is very capable of building relationships and having good rapport with her staff and other departments. She is efficient and is result oriented which helps her immensely in the area. Everyone wants their problem resolved yesterday and she is capable of making good things happen. This makes her reliable and a valued asset. Maria needs to work on how she communicates to individuals that do not understand or comprehend what she has discovered.

Results Oriented

Takes personal accountability for results; sets specific and difficult goals; monitors progress toward goals; sees action items through to completion; seldom lets obstacles get in the way; promptly responds to requests/issues; and is willing to ask others for help to achieve goals.

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria is extremely aggressive when it comes to being results oriented. She monitors progress and works towards goals. Maria does not know when to ask for help. If she would ask for help sooner she would be a high performer.

Teamwork

Is willing to assist and work cooperatively with co-workers; displays trust, respect, and appreciation for the individual talents, differences, and abilities of others regardless of cultural or demographic differences; considers impact of own work on others; collaborates with others; considers team needs before own; and shows respect for others

Rating: Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria works well with others. She has created an IC team and they have a very good team environment. She respects others and recognizes competent people. Her teamwork only suffers when her ego gets in the way. Knowing when to back down and not get emotional is something that Maria can work on and get better at.

Work Ethic

Takes personal accountability for getting work done; takes pride in the quality of own work; does what is right, not what is easy; takes initiative; pays attention to details; meets reasonable deadlines and keeps up with a fast-paced work environment; displays a positive, 'can do' attitude; and has a sense of urgency.

Rating: Top Performer

Weight: 10.0%

Comments by John Wilkinson:

Maria will work and get the job done. She wants it right the first time and strives to make everything perfect.

Performance Summary

This section summarizes the results from Job Accountabilities and Performance Factors sections of the performance evaluation form. The Overall Rating is computed by adding the average score on the Performance Factors with the weighted average score from the Job Accountabilities. The Overall Rating is based on the following rating scale:

Top Performer	4.36	5.00
High Performer	3.51	4.35
Performer	2.85	3.50
Needs Improvement	2.00	2.84
Non-Performer	1.00	1.99

Overall Rating 3.33 / 5.0

Job Accountabilities	3.25 / 5.0	50.0%
Accuracy_FS	Performer	25.0%
Productivity_FS	High Performer	25.0%
Projects Completed within Project Objectives	Performer	25.0%
Quality_FS	Performer	25.0%
Performance Factors	3.4 / 5.0	50.0%
Communication Skills	Needs Improvement	10.0%
Continuous Improvement	High Performer	10.0%
Customer Focus	Performer	10.0%
Job Knowledge	High Performer	10.0%
Planning & Organizing	Performer	10.0%
Problem Solving	High Performer	10.0%
Relationship Building	Performer	10.0%
Results Oriented	Performer	10.0%
Teamwork	Performer	10.0%
Work Ethic	Top Performer	10.0%

Development Plan Instructions - Manager

The purpose of this section is to identify up to three areas in which the employee should focus on for development. The employee may have drafted his/her ideas during the employee input phase. You should consider the employee's input, but you may add, delete, or modify

his/her development ideas. Together you will finalize the development plan.

To build the employee's development plan (or to add a new item) complete the following actions:

- a. One at a time, enter the areas you think the employee should focus on for development. To do this you will click on the button Add New Development Objective.
- b. For each performance factor, write a specific action plan for how the employee should improve their performance.
- c. Indicate a target date for completion of each action plan.
- d. Click on the save button to Save and Close that development item.
- e. Follow the same process to enter the next development area.

Here is an example of what your completed development plan may look like:

Performance Factor: Relationship Building

Action Plan: Action Plan: Talk to one person outside of your function each month with a list of predetermined questions to learn more about their function and how it relates to what you do.

Target Date For Completion: 06/30/20xx

Performance Factor: Teamwork

Action Plan: For the next two months when someone provides you with input or feedback practice not getting defensive. Look for points of agreement and common interest, especially if you disagree with what someone is saying. Show appreciation for their input. At the end of the two month period, ask your peers for feedback to see if you have improved.

Target Date for Completion: 03/01/20xx

Development Plan

Final Comments

Employee Comments: Please write any comments or information you wish to have documented as part of this review.

Employee Signature

Please print name and sign below.

Maria Suarez
Employee (Print Name)
[Signature] 6/15/2011
Employee Signature Date

John Wilkins
Manager (Print Name)
[Signature]
Manager Signature Date



04-15-2010 Launch for Maria Suarez

User Information

Last Name: Suarez
 First Name: Maria
 Title: Supervisor Inventory Con
 Department: NY Met Whse - Day
 Division: 4500
 Location: NY Metro - Syosset

Overview

The Performance Appraisal provides feedback and documents a manager's conclusions about an employee's performance contribution. The appraisal is about a job and how well it is performed.

In this process the employee will be evaluated against both what they have accomplished (Job Accountabilities) and how they accomplished them (Performance Factors). Both of these factors are equally important to overall job performance and thus they are equally weighted in this process.

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- Evaluating past performance.
- Development planning to improve future performance.

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Performance Rating Scale				
Non-Performer	Needs Improvement	Performer	High Performer	Top Performer

Top Performer

- **Far exceeds** key performance expectations; accomplishments are unique and sustained over the entire performance period
- Performance is exceptional and less supervision than normal is required
- A role model for others; it is difficult to indicate how performance could be improved

High Performer

- **Often exceeds** and consistently meets all key performance expectations
- Accomplishments and contributions are higher than required by the job

Performer

- All key job **expectations are met and sometimes exceeded** with normal direction and assistance
- A solid performer who displays all the behaviors required for successful job performance

Needs Improvement

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- **Performance partially satisfies the key requirements of the job**
- **Timely improvement is required** to consistently meet job expectations. This is a transition level requiring improvement to acceptable performance. The individual may be learning the role and not yet proficient

Non-Performer

- Performance does not meet key job requirements
- **Immediate and substantial improvement is required** or termination is indicated

Manager Instructions - Job Accountabilities

Please provide an individual rating on each of the key job accountabilities below. Use the scale provided above for your rating. For each job accountability you should provide specific examples of what the employee did/accomplished to achieve the selected rating. Each job accountability will be weighted to produce an overall Job Accountabilities Score.

Job Accountabilities

Accuracy_FS

- Work products are correct the first time

Rating: High Performer

Weight: 25.0%

Comments by Maria Suarez:

We, my department and the warehouse, have reached a high level of accuracy; great part of that accomplishment is due to the periodic physical inventories and reconciliations lead by me.

Comments by John Wilkinson:

Our shorts and missing cases have improved every month versus the same month from the year before.

Productivity_FS

- Amount of work accomplished
- Progress on project deliverables

Rating: High Performer

Weight: 25.0%

Comments by Maria Suarez:

My work is typically a day to day job; and, physical inventory to physical inventory reconciliation. But I also take part in time sensitive projects that are delivered timely.

Comments by John Wilkinson:

Maria has trained her staff to perform at a high level during inventories and day to day inquiries from sales, CS, etc

Projects Completed within Project Objectives

- On time
- On Budget
- Project execution is up to expectations

Rating: Performer

Weight: 25.0%

Comments by Maria Suarez:

Currently we are on the transition to a complete inventory using the RF system, I can say that we are ahead of the time frame given to us, the system reprogramming updates, and work tools acquisitions.

Comments by John Wilkinson:

Gets the job done on her own most of the time. Needs help occasionally. Thinking outside the box would help improve her ability to problem solve

Quality_FS

- Completed to professional standards
- Work products are user friendly

Rating: High Performer

Weight: 25.0%

Comments by Maria Suarez:

Many of the reports on the "warehouse custom menu" were requested, tested and reviewed by me and used by everyone in the warehouse; I have also created excel reports that are my department's tools and are used on a daily basis; and, I have helped in the creation of reports that are massively used by many people in this company, like Delivery reports in the past and Unsaleables reports more recently.

Comments by John Wilkinson:

Knows what she wants and is usually very clear about it.

Other Accomplishments

Please enter any other accomplishments you want your manager to be aware of before he/she completes your performance evaluation. This might be from special projects or other things you did outside of the scope of your normal work.

Section Comments:

Comments by Maria Suarez:

I have reduced considerably the cost on the office supplies part from over 5000 to under 500 per physical inventory

Attendance

Attendance is an important part of job expectations. Any rating below "consistently meets expectations" will require additional explanation and discussion. Continued attendance issues may result in discipline or jeopardize employment. Note: This rating does not get directly calculated into the employee's overall job accountabilities score.

Attendance

Rating: Consistently Meets Expectations

Comments by John Wilkinson:

Maria does what is needed when it comes to getting a physical completed

Manager Instructions - Performance Factors

Use this section to describe and rate the employee's performance against the critical Performance Factors for this role. Before you rate the Performance Factor you should click on the writing assistant for each Performance Factor to understand the guidelines for rating each Performance Factor. We have provided behavioral statements that define the bottom (Non-Performer), middle (Performer) & top (Top Performer) ends of the 5-point rating scale. It is possible that the overall evaluation of a given Performance Factor will fall between these three points on the scale (i.e., performance is best described as High Performer or Needs Improvement). You should use the most appropriate description along this 5-point rating scale. All of the Performance Factors are equally important to an employee's success and thus they will be averaged to arrive at the overall Performance Factor Score.

Performance Factors

Communication Skills

Communicates in a clear and timely manner; is honest and thorough in all communications; uses effective listening skills; provides presentations that are clear, logical and contain relevant information; and completes paperwork accurately and thoroughly.

Rating: Needs Improvement

Weight: 10.0%

Comments by John Wilkinson:

Written paperwork is excellent. Maria's communication skills are challenged by her 1st language being Spanish. This causes confusion sometimes. We are working together to improve that skill

Continuous Improvement

Regularly seeks out ways to accomplish work more efficiently; questions assumptions and offers suggestions for change; and

openly considers input from others on how to improve processes.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

She thinks smarter not harder almost all the time. Occasionally the thinking outside the box needs to occur more.

Customer Focus

(Customers may be internal or external.) Educates the customer about processes; modifies own style to match customer's; makes customers/suppliers needs their own priority; is willing to go above and beyond to meet customer needs; effectively diffuses customer problems; keeps customers informed; and is patient, calm, and polite with all customers.

Rating: Not Applicable

Weight: 10.0%

Job Knowledge

Is easily able to navigate company systems to access and enter information; has the basic knowledge needed to perform current role; stays up-to-date on new products and programs available and new work processes; actively works to expand knowledge base; understands how own role contributes to company performance; has a broad understanding of the industry and how it operates; understands basics of Federal and State ABC laws and regulations; can perform basic math skills needed for role; and consistently acts in a safe manner in the workplace.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Knows her job. Stubbornness gets in the way sometimes

Planning & Organizing

Prepares in advance and sets objectives; prioritizes work; is able to multi-task, uses time wisely; organizes work to improve efficiencies; provides flexibility in schedule for changes; develops processes for follow-up; and tracks product turnover to understand re-order needs.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Plans the physical inventories very well.

Problem Solving

Systematically collects information; integrates information from multiple sources; gets to the root cause of problems; is able to uncover trends, patterns or discrepancies; solves problems in a timely manner; considers consequences of decisions; considers alternative solutions to meet customer needs; does not bring problems to others, brings issues and potential solutions; and proactively reviews accounts so issues can be addressed quickly and problems avoided.

Rating: High Performer

Weight: 10.0%

Comments by John Wilkinson:

Needs to ask for help more often. Sometimes it's the simple issues that tie her up.

Relationship Building

Finds reasons to be in front of the customer/supplier; gets to know others; is friendly and develops good rapport; is reliable, delivers on commitments; creates win-win solutions; is respectful of others' time, is patient; develops broad internal and external relationships; adapts own style to mirror customers/suppliers; makes oneself a valued asset to customers; and projects a professional image.

Rating: Needs Improvement

Weight: 10.0%

Comments by John Wilkinson:

Needs to build a relationship with warehouse management and accounting

Results Oriented

Takes personal accountability for results; sets specific and difficult goals; monitors progress toward goals; sees action items

through to completion; seldom lets obstacles get in the way; promptly responds to requests/issues; and is willing to ask others for help to achieve goals.

Rating: Performer

Weight: 10.0%

Teamwork

Is willing to assist and work cooperatively with co-workers; displays trust, respect, and appreciation for the individual talents, differences, and abilities of others regardless of cultural or demographic differences; considers impact of own work on others; collaborates with others; considers team needs before own; and shows respect for others

Rating: Needs Improvement

Weight: 10.0%

Comments by John Wilkinson:

Needs improvement.

Work Ethic

Takes personal accountability for getting work done; takes pride in the quality of own work; does what is right, not what is easy; takes initiative; pays attention to details; meets reasonable deadlines and keeps up with a fast-paced work environment; displays a positive, 'can do' attitude; and has a sense of urgency.

Rating: High Performer

Weight: 10.0%

Performance Summary

This section summarizes the results from Job Accountabilities and Performance Factors sections of the performance evaluation form.

Overall Form Rating: Performer

	Rating	Weights
Job Accountabilities	Performer	50.0%
Accuracy_FS	High Performer	25.0%
Productivity_FS	High Performer	25.0%
Projects Completed within Project Objectives	Performer	25.0%
Quality_FS	High Performer	25.0%
Performance Factors	Performer	50.0%
Communication Skills	Needs Improvement	10.0%
Continuous Improvement	High Performer	10.0%
Customer Focus	Not Applicable	10.0%
Job Knowledge	High Performer	10.0%
Planning & Organizing	High Performer	10.0%
Problem Solving	High Performer	10.0%
Relationship Building	Needs Improvement	10.0%
Results Oriented	Performer	10.0%
Teamwork	Needs Improvement	10.0%
Work Ethic	High Performer	10.0%

Development Plan Instructions - Manager

The purpose of this section is to identify up to two areas of strength the employee can leverage, and up to three areas in which the employee should focus on for development. The employee may have drafted his/her ideas during the employee

input phase. You should consider the employee's input, but you may add, delete, or modify his/her development ideas. Together you will finalize the development plan.

To build the employee's development plan (or to add a new item) complete the following actions:

- a. One at a time, enter the two areas you think the employee should leverage as a strength. To do this you will click on the button "Add New Development Objective." Indicate this area is a strength by placing (strength) after the name of the performance factor.
- b. For each performance factor, write a specific action plan for how the employee should leverage this strength to help improve their performance and/or the performance of their team.
- c. Indicate a target date for completion of each action plan.
- d. Click on the save button to "Save and Close" that development item.
- e. Follow the same process to enter the second area to leverage.
- f. Next, one at a time, enter the three performance factors you want the employee to focus on for development. Indicate this area is a development need by placing (DN) after the name of the performance factor.
- g. Repeat steps B - D described above for each development need.

Here is an example of what your completed development plan may look like:

Performance Factor: Relationship Building (Strength)

Action Plan: Action Plan: Talk to one person outside of your function each month with a list of predetermined questions to learn more about their function and how it relates to what you do.

Target Date For Completion: 06/30/20xx

Performance Factor: Teamwork (DN)

Action Plan: For the next two months when someone provides you with input or feedback practice not getting defensive. Look for points of agreement and common interest, especially if you disagree with what someone is saying. Show appreciation for their input. At the end of the two month period, ask your peers for feedback to see if you have improved.

Target Date for Completion: 03/01/20xx

Development Plan

Final Comments

Employee Comments: Please write any comments or information you wish to have documented as part of this review.

Employee Signature

Please print name and sign below.

Maria Suarez

Employee (Print Name)

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Employee Signature

J. Wilkinson


Manager Signature

Date _____

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